INSTRUCTIONS – Using the On-Line TOS Wizard (Part C)

Your district submitted **Part A** of one or more applications in the recent days and you are now waiting for the other Wisconsin school district to complete **Part B** for each application. It is recommended that someone from your district check the Transfer of Service Portal on a regular basis to monitor if the **Part** P has been completed by the respective Wisconsin school district.

To start the process, you will need to login to the TOS Portal. From the **School Financial Services** home page (http://sfs.dpi.wi.gov/) the primary access point is as follows:

1. Scroll down the left-hand column and click on the "**Transfer of Service**" tab near the bottom.
    a. Click on the **PI-5000 On-line Application** near the top of the page.
    b. At this screen you will be asked to login using your "ID" and "Password" and click on the green "Login" button.
        i. *Please remember due to the identification of specific students, security is of high importance in this process.*
        ii. If you are assigning the monitoring responsibility to different a staff member, the District Administrator will need to grant them the necessary access to the TOS Portal.
            1. See "**INSTRUCTIONS – Using the On-Line TOS Wizard (Part A)**" if you have not been granted authority to enter the Portal.
    c. This is the "Status Summary" screen

The left side of the screen, below the "**Fiscal Year**", you will find a chart that give you a quick status report of any applications that have been filed in the fiscal year selected.

- The chart is divided into three sections and at this point in the process you are interested in the following statements and the values in the columns to the right of the statement:
    o "**Part A done, but waiting for Part B to be finished:**"
        ▪ This data tells you how many of your applications are waiting for another Wisconsin school district to complete **Part B**.
    o "**Parts A and B are done, but denied due to Part B:**"
        ▪ This data tells you if any of your applications have been **denied**.
            • You may contact a member of the School Financial Service Team if you have any questions.
    o "**Requests ready for submission:**"
        ▪ This data tells you how many of your applications you can submit by completing **Part C**.
- On the right side of the screen you will see the four (4) steps in the TOS process. "**Explanations**" or additional information is available to you by clicking on the links provided or scrolling down the screen.

To start the process select the "**Part C Submit to DPI**" tab and you will be taken to the "**Part C: Submit Transfer of Service Request to DPI**" screen. On this screen you should check the "**Fiscal Year**" for accuracy.
- Please select appropriate green tab in the center of the screen.
    o **Part C - SPED**

- o **Part C – LEP**
- After your selection has been made, scroll down the screen and complete the financial table.
- If **Part C** of a different Transfer of Service application has been submitted the values in the "**New Cost**" column will reflect those values in bold print.
- To the left in the "**Sum of Part A**" column is the total of all claims, under this tab, that have been completed to the point.
  - o If you agree with those values, you will need to modify the values in the "**New Cost**" column to match those values.
  - o If you believe a different total should be submitted, you may enter it in the same manner.
    - For Special Education applications only, it will serve the district well to provide a narrative in the box at the bottom of the screen below this statement. "**Explain any new costs identified as ineligible for categorical aid. All new costs are assumed to be eligible unless an explanation is provided:**"

At this point the Transfer of Service application Part C has been submitted. You may wish to print this screen for your records.

Final